OPEN STANDARDS/OPEN SOURCE WORKGROUP
CONCEPT PAPER

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Background

California State government needs to ensure its information resources are readily accessible to the public it serves, and reduce all barriers forestalling such access. The state must also ensure that its investments in information technology result in systems that are sufficiently interoperable to meet the business requirements of its agencies, yet effectively serve its constituencies.

These objectives may be achieved by adopting open data standards at all levels of state government as well as promoting the use of Open Source software solutions where appropriate. Open data standards would ensure that information can be readily accessed by the public, is interoperable within state government and can be widely distributed without regard to an agency's underlying IT infrastructures or systems supporting it. Open Source software could provide the state with cost savings and increased operational efficiencies and performance benefits.

Recommendation

To assess the opportunities as well as challenges presented by Open Standards and Open Source software it is proposed that the State CIO's Information Technology Council sponsor an Open Standards/Open Source Software Workgroup. The Workgroup would be comprised of CIO's as well as technical staff, representing large, medium and small departments, as well as the state's data centers.

The Workgroup would focus on the following:

1. Follow-up on the recommendation of the California Performance Review, State Operations No. 10 and facilitate the statewide evaluation of Open Source solutions that may be implemented in place of closed source solutions.

2. Similarly, follow-up on the CPR, SO No. 10 and facilitate the statewide research and evaluation of Open Source code alternatives to the use of the traditional procurement models for software.

3. Evaluate and promote the use (or adoption) of statewide Open Standards for data.

4. Evaluate opportunities for integrating Open Standards/Open Source solutions with existing systems (e.g.: Linux servers feeding Windows desktops via samba for various services, with an OSS message transferring agent proxying for Exchange boxes, to keep Exchange servers from being directly exposed to the Internet.)

5. Develop and maintain an index of Open Source applications in use within state government; create a California SourceForge website or encourage the feeding of other code collaborative sites.

6. Maintain a listserv of interested participants for sharing information, for fostering the requisite "community" for implementing Open Standards and Open Source solutions. Communication and participation at all levels of IT activity will be key.

7. Maintain a California State Open Standards/Open Source Web Portal.

8. Facilitate opportunities to participate on national and international open standard workgroups, committees, etc. Examples: Internet Engineering Task Force (IETF), SourceForge, Organization for the Advancement of Structured Information Standards (OASIS), World Wide Web Consortium (W3C).

9. Broker FAQ's through presentations, panel discussions, web forums, and so on. Questions to be addressed may include:

- What are impediments to adopting Open Standards/Open Source solutions?
- How does one learn about OS/OSS?
- Where is training offered or available?
- What are the inherent risks of Open Source solutions?
- How can good reliable software be free?
- What are cost/benefits of Open Standards; of Open Source?
- Does OSS really save money?
- How do Open Source licenses work?
- What are the legal issues and risks of Open Standards/Open Source?
- Who in state government is using Open Standards or Open Source solutions successfully; or unsuccessfully.
- What is status of the Massachusetts Open Standards effort?
- What lessons can be learned by California State government from Massachusetts?

Workgroup Organization

The workgroup would be a non-policy making committee comprised of no more than 12 principal members, but an unlimited number of associate members. Membership should reflect not just the biases of Open Standard advocates, but also managers and technical staff representing a wide range of ideas and perspectives on IT systems and data management in state government.

Once the workgroup is established, volunteers will be solicited and a charter will be developed. The charter and associated documents will define the purpose, goals, governance, strategies, deliverables, meeting schedules, and so on; to be approved by the state CIO before any further action is taken.